



DEPARTMENT OF THE TREASURY
WASHINGTON, D.C.

June 7, 2019

Sara Kaiser Creighton
Elizabeth France
John E. Bies
American Oversight
1030 15th Street NW, Suite B255
Washington, DC 20005
foia@americanoversight.org

VIA EMAIL

Re: *American Oversight v. U.S. Department of the Treasury*, 17-cv-2078-RBW (D.D.C.):
Treasury June 7, 2019 discretionary release

Counsel:

This letter describes the June 7, 2019 discretionary production from the U.S. Department of the Treasury (Treasury) in the above-referenced Freedom of Information Act litigation. After a careful review of materials identified in response to American Oversight's Congressional Communications FOIA Request, 2017-08-121, Treasury has determined that additional portions of the enclosed 18 documents previously withheld in part under Exemption 5 are appropriate candidates for discretionary release under the FOIA. The documents retain their original Bates numbers for ease of reference. Please note that portions of these documents are still withheld pursuant to Exemption 6 of the FOIA.

If you have any questions concerning this production or a related matter, please contact Rebecca Kopplin, U.S. Department of Justice, at (202) 514-3953.

Sincerely,

Ryan Law
Office of Privacy, Transparency, and Records
U.S. Department of the Treasury

Re: Tax Policy

From: "Kowalski, Daniel" </o=ustreasury/ou=exchange administrative group (fydibohf23spdlt)/cn=recipients/cn=cf6b4ee3710f422fbceecb0020766838-kowalski, dan">
To: "Callas, George" <george.callas@mail.house.gov>
Date: Sat, 04 Mar 2017 20:07:21 -0500

OK. It will likely be after 3. I'll give you an exact time no later than Tuesday.

From: Callas, George <George.Callas@mail.house.gov>
Date: March 4, 2017 at 7:54:14 PM EST
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: Re: Tax Policy

I'm free until 11:30 and then after 3.

From: "Daniel.Kowalski@treasury.gov"
Date: Saturday, March 4, 2017 at 4:38 PM
To: George
Subject: Re: Tax Policy

Absolutely.

From: Callas, George <George.Callas@mail.house.gov>
Date: March 4, 2017 at 4:28:38 PM EST
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: Re: Tax Policy

I'm sure I can make something work. I'd also like to loop in Barbara Angus from ways and means. Is that ok with you?

On Mar 4, 2017, at 12:56 PM, "Daniel.Kowalski@treasury.gov" <Daniel.Kowalski@treasury.gov> wrote:

Thanks Austin. George, I'm trying to get a group together this week. I've talked to Prater, so you may hear from him as well. Would Wednesday work?

Give me a call when you can at the desk number below, or my cell **b(6)**

From: Smythe, Austin <Austin.Smythe@mail.house.gov>
Date: March 4, 2017 at 12:13:22 PM EST
To: Callas, George <George.Callas@mail.house.gov>
Cc: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: RE: Tax Policy

Geore/Dan: Effort to connect you two.

From: Kowalski, Dan (Budget) [mailto:Dan_Kowalski@budget.senate.gov]
Sent: Thursday, March 02, 2017 10:35 AM
To: Smythe, Austin <Austin.Smythe@mail.house.gov>
Cc: daniel.kowalski@treasury.gov
Subject: Tax Policy

Hi Austin,

I moved over to Treasury yesterday. I'm working the tax reform issue out of the Secretary's office. It's a good gig, and one where I think I can make a difference, bringing some Congressional experience over to this part of the Executive Branch.

I was tasked yesterday with starting a conversation about the taxation of pass-through entities. Who would you recommend I reach out to, and can you provide me with contact information?

I've included my Treasury email on the cc line. My phone is **b(6)** (but I have to set the email up).

Thanks,
Dan

Sent from my BlackBerry 10 smartphone on the Verizon Wireless 4G LTE network.

RE: Pass-through working group

From: "Prater, Mark (Finance)" <mark_prater@finance.senate.gov>
To: "Kowalski, Daniel" <daniel.kowalski@treasury.gov>
Date: Mon, 06 Mar 2017 10:42:00 -0500

Hey Dan,

I talked with Barbara on Friday after we met and yesterday. She was going to check in with David Stewart on the logistics. Barbara said they may be marking up ACA repeal Wednesday, so that will put their tax team out-of-pocket. We can go Wednesday, but would want it to work for W+M. Dems will keep them in markup for a long day Wednesday.

From: Daniel.Kowalski@treasury.gov [mailto:Daniel.Kowalski@treasury.gov]
Sent: Monday, March 06, 2017 10:35 AM
To: Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Subject: Pass-through working group

Through Austin Symthe, I got in touch with George Callas over the weekend about scheduling a meeting for Wednesday on pass-throughs. He is available after 3 pm, and will loop in Barbara Angus. I told George you may be getting in touch with him as well.

Would 4:00 Wednesday work for you and your team? If so, I will work on getting a room at that time.

Thanks

Dan

Desk phone: b(6)

Gov't cell: b(6)

House/Senate/Treasury Meeting

Where: Capitol S-124
When: Fri Mar 10 15:00:00 2017 (America/New_York)
Until: Fri Mar 10 16:00:00 2017 (America/New_York)
Organiser: "Beaver, Sam (Finance)" <sam_beaver@finance.senate.gov>
Required Attendees: "Beaver, Sam (Finance)" <sam_beaver@finance.senate.gov>
"Dunn, Brendan (McConnell)" <brendan_dunn@mcconnell.senate.gov>
"Kowalski, Daniel" <daniel.kowalski@treasury.gov>
barbara.angus@mail.house.gov
"Prater, Mark (Finance)" <mark_prater@finance.senate.gov>
george.callas@mail.house.gov
"Acuna, Jennifer (Finance)" <jennifer_acuna@finance.senate.gov>
"Oman, Eric (Finance)" <eric_oman@finance.senate.gov>

We will be meeting to discuss options for providing appropriate preferential tax treatment for pass-through income

Re: Meet Thursday or Friday?

From: "Callas, George" <george.callas@mail.house.gov>
To: "Beaver, Sam (Finance)" <sam_beaver@finance.senate.gov>
Cc: "Angus, Barbara" <barbara.angus@mail.house.gov>, "Dunn, Brendan (McConnell)" <brendan_dunn@mcconnell.senate.gov>, "Kowalski, Daniel" <daniel.kowalski@treasury.gov>, "Prater, Mark (Finance)" <mark_prater@finance.senate.gov>
Date: Tue, 07 Mar 2017 15:06:23 -0500

Tie a bow around it.

On Mar 7, 2017, at 1:50 PM, Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov> wrote:

|

Correct - you should have just received a calendar invite a little while ago. Friday at 3pm in S124

Sent from my Verizon, Samsung Galaxy smartphone

----- Original message -----

From: "Angus, Barbara" <Barbara.Angus@mail.house.gov>
Date: 3/7/17 1:42 PM (GMT-05:00)
To: "Dunn, Brendan (McConnell)" <Brendan_Dunn@mcconnell.senate.gov>, Daniel.Kowalski@treasury.gov
Cc: "Beaver, Sam (Finance)" <Sam_Beaver@finance.senate.gov>, "Prater, Mark (Finance)" <Mark_Prater@finance.senate.gov>, "Callas, George" <George.Callas@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

Just to confirm. We're at 3pm Friday, right?!

Barbara M. Angus
Chief Tax Counsel
Committee on Ways and Means

b(6)

From: Dunn, Brendan (McConnell) [mailto:Brendan_Dunn@mcconnell.senate.gov]
Sent: March 7, 2017 1:14 PM
To: Daniel.Kowalski@treasury.gov
Cc: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Angus, Barbara <Barbara.Angus@mail.house.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Callas, George <George.Callas@mail.house.gov>
Subject: Re: Meet Thursday or Friday?

Done

Sent from my iPhone

On Mar 7, 2017, at 1:06 PM, "Daniel.Kowalski@treasury.gov" <Daniel.Kowalski@treasury.gov> wrote:

|

Fine with me.

From: Beaver, Sam (Finance) [mailto:Sam_Beaver@finance.senate.gov]
Sent: Tuesday, March 07, 2017 12:59 PM
To: Angus, Barbara <Barbara.Angus@mail.house.gov>; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Cc: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>; Callas, George <George.Callas@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

3pm works for Senate Finance. If that works for others, we can get S-124.

From: Angus, Barbara [<mailto:Barbara.Angus@mail.house.gov>]
Sent: Tuesday, March 07, 2017 12:40 PM
To: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Cc: Daniel.Kowalski@treasury.gov; Callas, George <George.Callas@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

Would 3 work?

----- Original Message -----

Subject: RE: Meet Thursday or Friday?

From: "Beaver, Sam (Finance)" <Sam_Beaver@finance.senate.gov>

Date: Mar 7, 2017, 12:27 PM

To: "Dunn, Brendan (McConnell)" <Brendan_Dunn@mcconnell.senate.gov>, "Prater, Mark (Finance)" <Mark_Prater@finance.senate.gov>

SFC has weekly staff meeting but we could make 2pm work.

From: Dunn, Brendan (McConnell)
Sent: Tuesday, March 07, 2017 12:22 PM
To: Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Cc: Daniel.Kowalski@treasury.gov; Barbara.Angus@mail.house.gov; George.Callas@mail.house.gov; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>
Subject: Re: Meet Thursday or Friday?

2?

Sent from my iPhone

On Mar 7, 2017, at 12:13 PM, Prater, Mark (Finance) <Mark_Prater@finance.senate.gov> wrote:

SFC can make that work.

From: Daniel.Kowalski@treasury.gov [<mailto:Daniel.Kowalski@treasury.gov>]
Sent: Tuesday, March 07, 2017 12:12 PM

To: Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; Barbara.Angus@mail.house.gov; George.Callas@mail.house.gov; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Subject: RE: Meet Thursday or Friday?

Nothing like a Friday afternoon meeting to talk about tax policy. 4 on Friday is fine with me.

I would suggest we have it over on the hill. I would bring a couple of people from OTA as well.

From: Dunn, Brendan (McConnell) [mailto:Brendan_Dunn@mcconnell.senate.gov]
Sent: Tuesday, March 07, 2017 12:04 PM
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>; Barbara.Angus@mail.house.gov; George.Callas@mail.house.gov; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Subject: RE: Meet Thursday or Friday?

We were talking Thursday.
Now I think we are talking Friday.

Brendan M. Dunn
Policy Advisor and Counsel
Office of the Senate Majority Leader

b(6) [REDACTED] (desk)
[REDACTED] (mobile)

Brendan_Dunn@mcconnell.senate.gov

From: Daniel.Kowalski@treasury.gov [<mailto:Daniel.Kowalski@treasury.gov>]
Sent: Tuesday, March 07, 2017 12:03 PM
To: Barbara.Angus@mail.house.gov; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; George.Callas@mail.house.gov; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Subject: RE: Meet Thursday or Friday?

I thought we were talking about Thursday.

From: Angus, Barbara [<mailto:Barbara.Angus@mail.house.gov>]
Sent: Tuesday, March 07, 2017 11:45 AM
To: 'Dunn, Brendan (McConnell)' <Brendan_Dunn@mcconnell.senate.gov>; Callas, George <George.Callas@mail.house.gov>; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: RE: Meet Thursday or Friday?

That works. We're talking Friday, right?

Barbara M. Angus
Chief Tax Counsel
Committee on Ways and Means

b(6) [REDACTED]

From: Dunn, Brendan (McConnell) [mailto:Brendan_Dunn@mcconnell.senate.gov]
Sent: March 7, 2017 11:26 AM
To: Callas, George <George.Callas@mail.house.gov>; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Daniel.Kowalski@treasury.gov; Angus, Barbara <Barbara.Angus@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

2 pm does not work.
Can we do later in the afternoon? 4 pm?

Brendan M. Dunn
Policy Advisor and Counsel
Office of the Senate Majority Leader
b(6) (desk)
(mobile)
Brendan_Dunn@mcconnell.senate.gov

From: Callas, George [<mailto:George.Callas@mail.house.gov>]
Sent: Tuesday, March 07, 2017 10:11 AM
To: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Daniel.Kowalski@treasury.gov; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; Angus, Barbara <Barbara.Angus@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

Adding Barbara. 2pm works well for me.

From: Beaver, Sam (Finance) [mailto:Sam_Beaver@finance.senate.gov]
Sent: Tuesday, March 07, 2017 10:08 AM
To: Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Daniel.Kowalski@treasury.gov; Callas, George <George.Callas@mail.house.gov>; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>
Subject: RE: Meet Thursday or Friday?

Also looping Brendan Dunn. 2pm works for Senate Finance, I can also work with our clerks to secure S-124 in the Capitol if need be.

-Sam

From: Prater, Mark (Finance)
Sent: Tuesday, March 07, 2017 10:01 AM
To: Daniel.Kowalski@treasury.gov; George.Callas@mail.house.gov
Cc: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>
Subject: RE: Meet Thursday or Friday?

Sam can help organize on our end.

From: Prater, Mark (Finance)
Sent: Tuesday, March 07, 2017 9:11 AM
To: Daniel.Kowalski@treasury.gov; George.Callas@mail.house.gov
Subject: RE: Meet Thursday or Friday?

Thanks, Dan.

How about 2 p.m.?

Sent from my Verizon, Samsung Galaxy smartphone

----- Original message -----

From: Daniel.Kowalski@treasury.gov

Date: 3/6/17 5:56 PM (GMT-05:00)

To: "Prater, Mark (Finance)" <Mark_Prater@finance.senate.gov>, George.Callas@mail.house.gov

Subject: Meet Thursday or Friday?

I understand that the Ways and Means Committee is going to be marking up the Obamacare reconciliation bill on Wednesday, so I don't think we will be able to start a conversation about issues surrounding the taxation of pass-through entities on that day like we had discussed. Would Thursday be a possibility? Right now I'm open after 10:30 am, so it's an easy day for me to meet. Friday is a little more full, but later in the afternoon would work.

I'm happy to host at Treasury, but attendees will need to get us the name on the ID, date of birth, social security number, and citizenship of each person who comes down here 24 hours in advance of the meeting.

Let's try to set a time for this. What works for you?

Dan

FW: House/Senate/Treasury Meeting

Where: Capitol S-124
When: Fri Mar 10 15:00:00 2017 (America/New_York)
Until: Fri Mar 10 16:00:00 2017 (America/New_York)
Organiser: "Beaver, Sam (Finance)" <sam_beaver@finance.senate.gov>
Required Attendees: "Beaver, Sam (Finance)" <sam_beaver@finance.senate.gov>
"West, Thomas" <thomas.west@treasury.gov>
"Mackie, James III" <james.mackie@treasury.gov>
"Lim, Katherine" <katherine.lim@treasury.gov>
"Vallabhaneni, Krishna" <krishna.vallabhaneni@treasury.gov>
"Berk, Ari" <ari.berk@treasury.gov>
"Borosh, Ossie" <ossie.borosh@treasury.gov>
"Prisinzano, Richard" <richard.prisinzano@treasury.gov>
"Dunn, Brendan (McConnell)" <brendan_dunn@mcconnell.senate.gov>
"Kowalski, Daniel" <daniel.kowalski@treasury.gov>
barbara.angus@mail.house.gov
"Prater, Mark (Finance)" <mark_prater@finance.senate.gov>
george.callas@mail.house.gov
"Acuna, Jennifer (Finance)" <jennifer_acuna@finance.senate.gov>
"Oman, Eric (Finance)" <eric_oman@finance.senate.gov>
Optional Attendee: "Muzinich, Justin" <justin.muzinich@treasury.gov>

-----Original Appointment-----

From: Beaver, Sam (Finance) [mailto:Sam_Beaver@finance.senate.gov]
Sent: Tuesday, March 07, 2017 1:26 PM
To: Beaver, Sam (Finance); Dunn, Brendan (McConnell); Kowalski, Daniel; Barbara.Angus@mail.house.gov; Prater, Mark (Finance); George.Callas@mail.house.gov; Acuna, Jennifer (Finance); Oman, Eric (Finance)
Subject: House/Senate/Treasury Meeting
When: Friday, March 10, 2017 3:00 PM-4:00 PM (UTC-05:00) Eastern Time (US & Canada).
Where: Capitol S-124

We will be meeting to discuss options for providing appropriate preferential tax treatment for pass-through income

FW: House/Senate/Treasury Meeting

Where: Capitol S-124
When: Fri Mar 10 15:00:00 2017 (America/New_York)
Until: Fri Mar 10 16:00:00 2017 (America/New_York)
Organiser: "Beaver, Sam (Finance)" <sam_beaver@finance.senate.gov>
Required Attendees: "Beaver, Sam (Finance)" <sam_beaver@finance.senate.gov>
"Carlson, Curtis" <curtis.carlson@treasury.gov>
"Dunn, Brendan (McConnell)" <brendan_dunn@mcconnell.senate.gov>
"Kowalski, Daniel" <daniel.kowalski@treasury.gov>
barbara.angus@mail.house.gov
"Prater, Mark (Finance)" <mark_prater@finance.senate.gov>
george.callas@mail.house.gov
"Acuna, Jennifer (Finance)" <jennifer_acuna@finance.senate.gov>
"Oman, Eric (Finance)" <eric_oman@finance.senate.gov>

Curtis, I sent this to several people yesterday per a list put together by Jay Mackie, but missed your name. Sorry.

-----Original Appointment-----

From: Beaver, Sam (Finance) [mailto:Sam_Beaver@finance.senate.gov]
Sent: Tuesday, March 07, 2017 1:26 PM
To: Beaver, Sam (Finance); Dunn, Brendan (McConnell); Kowalski, Daniel; Barbara.Angus@mail.house.gov; Prater, Mark (Finance); George.Callas@mail.house.gov; Acuna, Jennifer (Finance); Oman, Eric (Finance)
Subject: House/Senate/Treasury Meeting
When: Friday, March 10, 2017 3:00 PM-4:00 PM (UTC-05:00) Eastern Time (US & Canada).
Where: Capitol S-124

We will be meeting to discuss options for providing appropriate preferential tax treatment for pass-through income

RE: House/Senate/Treasury Meeting

From: "Beaver, Sam (Finance)" <sam_beaver@finance.senate.gov>
To: "Kowalski, Daniel" <daniel.kowalski@treasury.gov>
Date: Wed, 08 Mar 2017 10:40:02 -0500

Received. Might be a little tight but assuming that only a small percentage of these folks will actively be participating we should still be able to fit the main participants (yourself, Prater, Barbara, George etc) at the conference table and have everyone else sit on the surrounding sofas. I'll send this over to the Senate Appointment desk staff.

-Sam

From: Daniel.Kowalski@treasury.gov [mailto:Daniel.Kowalski@treasury.gov]
Sent: Wednesday, March 08, 2017 10:17 AM
To: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>
Subject: RE: House/Senate/Treasury Meeting

Sorry it's such a large list. Jay Mackie wanted 8 folks from OTA to attend and felt their presence would be useful.

West, Thomas (Thomas.West@treasury.gov)
Mackie, James III (James.Mackie@treasury.gov)
Lim, Katherine (Katherine.Lim@treasury.gov)
Vallabhaneni, Krishna (Krishna.Vallabhaneni@treasury.gov)
Berk, Ari (Ari.Berk@treasury.gov)
Carlson, Curtis (Curtis.Carlson@treasury.gov)
Borosh, Ossie (Ossie.Borosh@treasury.gov)
Prisinzano, Richard (Richard.Prisinzano@treasury.gov)
Muzinich, Justin (Justin.Muzinich@treasury.gov)
Kowalski, Daniel (Daniel.Kowalski@treasury.gov)

From: Beaver, Sam (Finance) [mailto:Sam_Beaver@finance.senate.gov]
Sent: Wednesday, March 08, 2017 9:51 AM
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: RE: House/Senate/Treasury Meeting

Dan – when you get a chance can you send me the full names of everyone from off the Hill that will be attending on your end? We'll need to make sure their names are with the Senate Appointments desk at the North Door so they can get visitor tags when they go through security.

From: Daniel.Kowalski@treasury.gov [mailto:Daniel.Kowalski@treasury.gov]
Sent: Tuesday, March 07, 2017 1:56 PM
To: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>
Subject: RE: House/Senate/Treasury Meeting

Sam, this has the meeting as showing up for today. Can you resend?

-----Original Appointment-----

From: Beaver, Sam (Finance) [mailto:Sam_Beaver@finance.senate.gov]
Sent: Tuesday, March 07, 2017 1:26 PM
To: Dunn, Brendan (McConnell); Kowalski, Daniel
Cc: Barbara.Angus@mail.house.gov; Prater, Mark (Finance); George.Callas@mail.house.gov
Subject: House/Senate/Treasury Meeting

When: Tuesday, March 07, 2017 3:00 PM-4:00 PM (UTC-05:00) Eastern Time (US & Canada).
Where: S-124

From: Dunn, Brendan (McConnell)
Sent: Tuesday, March 07, 2017 1:14 PM
To: Daniel.Kowalski@treasury.gov
Cc: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Barbara.Angus@mail.house.gov;
Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; George.Callas@mail.house.gov
Subject: Re: Meet Thursday or Friday?

Done

Sent from my iPhone

On Mar 7, 2017, at 1:06 PM, "Daniel.Kowalski@treasury.gov" <Daniel.Kowalski@treasury.gov> wrote:

Fine with me.

From: Beaver, Sam (Finance) [mailto:Sam_Beaver@finance.senate.gov]
Sent: Tuesday, March 07, 2017 12:59 PM
To: Angus, Barbara <Barbara.Angus@mail.house.gov>; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Cc: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>; Callas, George <George.Callas@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

3pm works for Senate Finance. If that works for others, we can get S-124.

From: Angus, Barbara [<mailto:Barbara.Angus@mail.house.gov>]
Sent: Tuesday, March 07, 2017 12:40 PM
To: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Cc: Daniel.Kowalski@treasury.gov; Callas, George <George.Callas@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

Would 3 work?

----- Original Message -----

Subject: RE: Meet Thursday or Friday?

From: "Beaver, Sam (Finance)" <Sam_Beaver@finance.senate.gov>

Date: Mar 7, 2017, 12:27 PM

To: "Dunn, Brendan (McConnell)" <Brendan_Dunn@mcconnell.senate.gov>; "Prater, Mark (Finance)" <Mark_Prater@finance.senate.gov>

SFC has weekly staff meeting but we could make 2pm work.

From: Dunn, Brendan (McConnell)
Sent: Tuesday, March 07, 2017 12:22 PM
To: Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Cc: Daniel.Kowalski@treasury.gov; Barbara.Angus@mail.house.gov; George.Callas@mail.house.gov;
Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>
Subject: Re: Meet Thursday or Friday?

2?

Sent from my iPhone

On Mar 7, 2017, at 12:13 PM, Prater, Mark (Finance) <Mark_Prater@finance.senate.gov> wrote:

SFC can make that work.

From: Daniel.Kowalski@treasury.gov [<mailto:Daniel.Kowalski@treasury.gov>]
Sent: Tuesday, March 07, 2017 12:12 PM
To: Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; Barbara.Angus@mail.house.gov; George.Callas@mail.house.gov; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Subject: RE: Meet Thursday or Friday?

Nothing like a Friday afternoon meeting to talk about tax policy. 4 on Friday is fine with me.

I would suggest we have it over on the hill. I would bring a couple of people from OTA as well.

From: Dunn, Brendan (McConnell) [mailto:Brendan_Dunn@mcconnell.senate.gov]
Sent: Tuesday, March 07, 2017 12:04 PM
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>; Barbara.Angus@mail.house.gov; George.Callas@mail.house.gov; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Subject: RE: Meet Thursday or Friday?

We were talking Thursday.
Now I think we are talking Friday.

Brendan M. Dunn
Policy Advisor and Counsel
Office of the Senate Majority Leader

b(6) [REDACTED] (desk)
[REDACTED] (mobile)

Brendan_Dunn@mcconnell.senate.gov

From: Daniel.Kowalski@treasury.gov [<mailto:Daniel.Kowalski@treasury.gov>]
Sent: Tuesday, March 07, 2017 12:03 PM
To: Barbara.Angus@mail.house.gov; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; George.Callas@mail.house.gov; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Subject: RE: Meet Thursday or Friday?

I thought we were talking about Thursday.

From: Angus, Barbara [<mailto:Barbara.Angus@mail.house.gov>]
Sent: Tuesday, March 07, 2017 11:45 AM
To: 'Dunn, Brendan (McConnell)' <Brendan_Dunn@mcconnell.senate.gov>; Callas, George <George.Callas@mail.house.gov>; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: RE: Meet Thursday or Friday?

That works. We're talking Friday, right?

Barbara M. Angus

Chief Tax Counsel
Committee on Ways and Means

b(6)

From: Dunn, Brendan (McConnell) [mailto:Brendan_Dunn@mcconnell.senate.gov]
Sent: March 7, 2017 11:26 AM
To: Callas, George <George.Callas@mail.house.gov>; Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Daniel.Kowalski@treasury.gov; Angus, Barbara <Barbara.Angus@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

2 pm does not work.
Can we do later in the afternoon? 4 pm?

Brendan M. Dunn
Policy Advisor and Counsel
Office of the Senate Majority Leader

b(6) (desk)
(mobile)

Brendan_Dunn@mcconnell.senate.gov

From: Callas, George [<mailto:George.Callas@mail.house.gov>]
Sent: Tuesday, March 07, 2017 10:11 AM
To: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Daniel.Kowalski@treasury.gov; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>; Angus, Barbara <Barbara.Angus@mail.house.gov>
Subject: RE: Meet Thursday or Friday?

Adding Barbara. 2pm works well for me.

From: Beaver, Sam (Finance) [mailto:Sam_Beaver@finance.senate.gov]
Sent: Tuesday, March 07, 2017 10:08 AM
To: Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>; Daniel.Kowalski@treasury.gov; Callas, George <George.Callas@mail.house.gov>; Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>
Subject: RE: Meet Thursday or Friday?

Also looping Brendan Dunn. 2pm works for Senate Finance, I can also work with our clerks to secure S-124 in the Capitol if need be.

-Sam

From: Prater, Mark (Finance)
Sent: Tuesday, March 07, 2017 10:01 AM
To: Daniel.Kowalski@treasury.gov; George.Callas@mail.house.gov
Cc: Beaver, Sam (Finance) <Sam_Beaver@finance.senate.gov>
Subject: RE: Meet Thursday or Friday?

Sam can help organize on our end.

From: Prater, Mark (Finance)
Sent: Tuesday, March 07, 2017 9:11 AM
To: Daniel.Kowalski@treasury.gov; George.Callas@mail.house.gov
Subject: RE: Meet Thursday or Friday?

Thanks, Dan.

How about 2 p.m..?

Sent from my Verizon, Samsung Galaxy smartphone

----- Original message -----

From: Daniel.Kowalski@treasury.gov

Date: 3/6/17 5:56 PM (GMT-05:00)

To: "Prater, Mark (Finance)" <Mark_Prater@finance.senate.gov>, George.Callas@mail.house.gov

Subject: Meet Thursday or Friday?

I understand that the Ways and Means Committee is going to be marking up the Obamacare reconciliation bill on Wednesday, so I don't think we will be able to start a conversation about issues surrounding the taxation of pass-through entities on that day like we had discussed. Would Thursday be a possibility? Right now I'm open after 10:30 am, so it's an easy day for me to meet. Friday is a little more full, but later in the afternoon would work.

I'm happy to host at Treasury, but attendees will need to get us the name on the ID, date of birth, social security number, and citizenship of each person who comes down here 24 hours in advance of the meeting.

Let's try to set a time for this. What works for you?

Dan

RE: quick question

From: "Angus, Barbara" <barbara.angus@mail.house.gov>
To: "Kowalski, Daniel" <daniel.kowalski@treasury.gov>
Date: Tue, 14 Mar 2017 09:47:18 -0400

Terrific. I'm looking forward to it. Thanks.

Barbara M. Angus
Chief Tax Counsel
Committee on Ways and Means

b(6)

From: Daniel.Kowalski@treasury.gov [mailto:Daniel.Kowalski@treasury.gov]
Sent: March 14, 2017 9:45 AM
To: Angus, Barbara <Barbara.Angus@mail.house.gov>
Subject: RE: quick question

Please bring whoever you need. The room is large enough for 20 at the table.

From: Angus, Barbara [<mailto:Barbara.Angus@mail.house.gov>]
Sent: Tuesday, March 14, 2017 9:42 AM
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: quick question

Hi Dan,

Just wanted to follow up on your note. At our Friday meeting, I brought with me two members of the W&M tax team who are very involved in our work on the new pass-through rate – John Sandell and Victoria Glover. I'd like to bring them to the Thursday meeting if there is room – if that works for you, I'll gather all our clearance info and send it in this morning.

Thanks very much,
Barbara

Barbara M. Angus
Chief Tax Counsel
Committee on Ways and Means
U.S. House of Representatives
b(6)

RE: Trump: White House will release tax reform plan next week

From: "Prater, Mark (Finance)" <mark_prater@finance.senate.gov>
To: "Muzinich, Justin" <justin.muzinich@treasury.gov>, "Kowalski, Daniel" <daniel.kowalski@treasury.gov>
Date: Fri, 21 Apr 2017 16:24:05 -0400

Okie dokes. Thanks for getting back to me.

From: Justin.Muzinich@treasury.gov [mailto:Justin.Muzinich@treasury.gov]
Sent: Friday, April 21, 2017 4:12 PM
To: Daniel.Kowalski@treasury.gov; Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Subject: Re: Trump: White House will release tax reform plan next week

Sorry Mark, not right now. Let's chat early next week.

From: Prater, Mark (Finance) <Mark_Prater@finance.senate.gov>
Date: April 21, 2017 at 4:08:29 PM EDT
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>, Muzinich, Justin <Justin.Muzinich@treasury.gov>
Subject: Trump: White House will release tax reform plan next week

Hey Dan and Justin,

Is there anything you can share? Best number for me is b(6) Let me now. Thanks.

From: POLITICO Pro <politicoemail@politicopro.com>
Date: April 21, 2017 at 2:44:59 PM EDT
To: <julia Lawless@finance.senate.gov>
Subject: Trump: White House will release tax reform plan next week
Reply-To: POLITICO subscriptions <reply-fe92127375650d7e72-553241_HTML-637934161-1376319-95306@politicoemail.com>

By Nolan D. McCaskill

04/21/2017 02:29 PM EDT

President Donald Trump today said he will release his administration's tax reform plan next week.

The president told The Associated Press that individuals and businesses will receive "massive tax cuts" under his tax reform plan. Trump provided no details, according to AP, but predicted the cuts would be "bigger I believe than any tax cut ever."

He added that the plan will be unveiled "Wednesday or shortly thereafter."

After a two-week Easter recess, lawmakers will return to Washington next week facing a deadline to fund the government and a possible floor vote on legislation to repeal and replace Obamacare.

Trump has long promised massive tax cuts but said this week it would be easier to accomplish if Republicans passed legislation to repeal and replace Obamacare first.

Speaking in Wisconsin this week, Trump had signaled that a tax reform plan would be coming “very soon.” “Our tax reform and tax plan is coming along very well,” he said Tuesday. “It’s going to be out very soon. We’re working on health care and we’re going to get that done, too.”

Was this Pro content helpful? Tell us what you think in one click.



[Yes, very](#)



[Somewhat](#)



[Neutral](#)



[Not really](#)



[Not at all](#)

You received this POLITICO Pro content because your customized settings include: Tax: all tags; Health Care: all tags; Trade: all tags. To change your alert settings, please go to <https://www.politicopro.com/settings>

This email was sent by: **POLITICO, LLC**
1000 Wilson Blvd. Arlington, VA, 22209, USA

RE: Childcare

From: "Orr, Caleb (Rubio)" <caleb_orr@rubio.senate.gov>
To: "Kowalski, Daniel" <daniel.kowalski@treasury.gov>
Date: Mon, 08 May 2017 16:54:52 -0400

Dan, thanks very much for taking the time for today's call. I appreciated you talking with me while you were at Budget and look forward to working with you on tax reform.

I just wanted to add a note from the conclusion Ivanka's op-ed in the *WSJ* from the day the Trump campaign rolled out the child care plan (emphasis mine):

"...every parent should have the freedom to make the best decisions for his or her family. My father is prepared to chart a new course that promotes strong families and celebrates their **individual needs**; one that honors, respects and empowers **both working and stay-at-home mothers and caregivers**. Together, we will take a stand and enable the American family and the modern workforce to thrive."

<https://www.wsj.com/articles/the-trump-plan-will-help-working-mothers-1473803187>

My boss 100% agrees with this assessment and we want to make sure that if tax reform gets done, we can help you fulfill that promise.

Best,
Caleb

From: Daniel.Kowalski@treasury.gov [mailto:Daniel.Kowalski@treasury.gov]
Sent: Monday, May 08, 2017 2:17 PM
To: Orr, Caleb (Rubio)
Subject: RE: Childcare

So my schedule was just changed, and tomorrow is no longer viable for me. Are you still available today? If so, can we talk at 3:30 today?

Sorry for the change.

From: Orr, Caleb (Rubio) [mailto:Caleb_Orr@rubio.senate.gov]
Sent: Monday, May 08, 2017 12:27 PM
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: RE: Childcare

Great, talk soon Dan.

From: Daniel.Kowalski@treasury.gov [mailto:Daniel.Kowalski@treasury.gov]
Sent: Monday, May 08, 2017 12:25 PM
To: Orr, Caleb (Rubio)
Subject: RE: Childcare

Yes, that's my direct.

Talk to you tomorrow.

Dan

From: Orr, Caleb (Rubio) [mailto:Caleb_Orr@rubio.senate.gov]
Sent: Monday, May 08, 2017 12:21 PM
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>

Subject: RE: Childcare

That works. Can I reach you at the number in your email signature?

From: Daniel.Kowalski@treasury.gov [<mailto:Daniel.Kowalski@treasury.gov>]
Sent: Monday, May 08, 2017 12:17 PM
To: Orr, Caleb (Rubio)
Subject: RE: Childcare

Can we talk by phone tomorrow at 10:30?

From: Orr, Caleb (Rubio) [mailto:Caleb_Orr@rubio.senate.gov]
Sent: Monday, May 08, 2017 12:10 PM
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: RE: Childcare

Dan, it's good to hear from you – I had seen your move to Treasury in the news, congratulations. Yes, I'm working the child care issue for my boss and it would be great to talk with you about it.

My open slots this week are:
Monday, May 8, 3-4:30pm
Tuesday, May 9, 10-11am
Thursday, May 10 9:30-Noon
Friday afternoon

Let me know if any of these would work for you.

Caleb Orr
Legislative Assistant
Senator Marco Rubio
202-224-3041

From: Daniel.Kowalski@treasury.gov [<mailto:Daniel.Kowalski@treasury.gov>]
Sent: Monday, May 08, 2017 11:49 AM
To: Orr, Caleb (Rubio)
Subject: Childcare

Caleb, we met during the transition while I was still at the Senate. I am now working at Treasury, and was wondering if you are still working the childcare issue for Sen. Rubio. If so, I'd like to discuss where you are currently on the issue.

Let me know if you are still the correct point of contact, and we can perhaps set up a time for a call.

Dan Kowalski
Counselor to the Secretary
Department of Treasury
b(6)

RE: calendar

From: "Dunn, Brendan (McConnell)" <brendan_dunn@mcconnell.senate.gov>
To: "Muzinich, Justin" <justin.muzinich@treasury.gov>
Cc: "Kowalski, Daniel" <daniel.kowalski@treasury.gov>
Date: Mon, 15 May 2017 10:52:48 -0400
Attachments: Proposed Tax Reform Calendar 051217.xlsx (11.21 kB)

Brendan M. Dunn
Policy Advisor and Counsel
Office of the Senate Majority Leader

From: Justin.Muzinich@treasury.gov [mailto:Justin.Muzinich@treasury.gov]
Sent: Monday, May 15, 2017 9:49 AM
To: Dunn, Brendan (McConnell) <Brendan_Dunn@mcconnell.senate.gov>
Cc: Daniel.Kowalski@treasury.gov
Subject: RE: calendar

thanks

From: Dunn, Brendan (McConnell) [mailto:Brendan_Dunn@mcconnell.senate.gov]
Sent: Monday, May 15, 2017 9:49 AM
To: Muzinich, Justin <Justin.Muzinich@treasury.gov>
Cc: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: Re: calendar

Will have before your meeting today

Sent from my iPhone

On May 15, 2017, at 9:40 AM, "Justin.Muzinich@treasury.gov" <Justin.Muzinich@treasury.gov> wrote:

Hi Brendan – just wondering when you might have a draft calendar you can share? Dan and I are mtg w the Secretary on taxes at 1:45pm today and at 9:45am tmrw. We would love to be able to share a draft for his reaction at one of those. Thanks.

Treasury: Pass-Through Tax Issue

From: "Bailey, Bradley" </o=ustreasury/ou=exchange administrative group (fydibohf23spdlt)/cn=recipients/cn=7eb678b02d9b41c0af365038a082c58e-bailey, bradl">
To: veronica.wong@mail.house.gov, tyler.grimm@mail.house.gov
Cc: "Kowalski, Daniel" <daniel.kowalski@treasury.gov>
Date: Fri, 26 May 2017 15:50:19 -0400

Hi Veronica and Tyler:

Your boss raised an pass-through taxation idea at a tax reform listening session earlier this week with Secretary Mnuchin. We wanted to follow up to see if we could learn more about it.

Best,

Brad

Brad Bailey
Deputy Assistant Secretary for Tax and Budget
Office of Legislative Affairs
U.S. Department of the Treasury
Bradley.bailey@treasury.gov

C: b(6)

O:

RE: Reaching Out

From: "Bailey, Bradley" </o=ustreasury/ou=exchange administrative group (fydibohf23spdlt)/cn=recipients/cn=7eb678b02d9b41c0af365038a082c58e-bailey, bradl">
To: "Davis, William" <william.davis@mail.house.gov>
Date: Mon, 12 Jun 2017 14:01:17 -0400

Need it now. I have to clear you into the building.

From: Davis, William [mailto:William.Davis@mail.house.gov]
Sent: Monday, June 12, 2017 1:59 PM
To: Bailey, Bradley <Bradley.Bailey@treasury.gov>
Subject: RE: Reaching Out

That works for me. Do you need the information now, or should I bring it with me?

Best,
Will

From: Bradley.Bailey@treasury.gov [mailto:Bradley.Bailey@treasury.gov]
Sent: Monday, June 12, 2017 8:55 AM
To: Davis, William
Subject: RE: Reaching Out

We have a dining room with a balcony inside the building. It's worth seeing if you've never been here. Just fill this out to get in the building. (Make sure to follow format instructions xx/xx/xxxx for bday etc.)

It's country club style so if you remember to bring \$10 great, otherwise don't worry about it.

Adam Wolf may be joining us as well.

From: Davis, William [mailto:William.Davis@mail.house.gov]
Sent: Saturday, June 10, 2017 11:37 PM
To: Bailey, Bradley <Bradley.Bailey@treasury.gov>
Subject: Re: Reaching Out

Lunch works for me. Happy to meet wherever works for you.

Best,
Will

Sent from my iPhone

On Jun 9, 2017, at 8:59 PM, "Bradley.Bailey@treasury.gov" <Bradley.Bailey@treasury.gov> wrote:

Hey Will,

I'll be on the Hill at 1:30 so I was going to stop by at 2. But, interested in coming over here for lunch instead around noon?

Brad

From: Davis, William [mailto:William.Davis@mail.house.gov]
Sent: Friday, June 09, 2017 8:57 PM

To: Bailey, Bradley <Bradley.Bailey@treasury.gov>
Subject: Re: Reaching Out

Hi Brad,

2pm next Friday would work great. I'm happy to head over to you. Just let me know where to go.

Best,
Will

Sent from my iPhone

On Jun 9, 2017, at 8:14 PM, "Bradley.Bailey@treasury.gov" <Bradley.Bailey@treasury.gov> wrote:

Hey Will—hope all is well too. How about next Friday? 2pm?

From: Davis, William [<mailto:William.Davis@mail.house.gov>]
Sent: Friday, June 09, 2017 4:55 PM
To: Bailey, Bradley <Bradley.Bailey@treasury.gov>
Subject: Reaching Out

Hi Brad,

I hope you are doing well. I just wanted to follow up and see if you have some time in the near future to meet to catch up and discuss some of my boss's priorities and projects for tax reform, which includes energy, university endowment reform, and financial products. I look forward to hearing from you soon.

Best,
Will

William R. Davis
Tax Policy Counsel
Congressman Tom Reed (NY-23)
2437 Rayburn House Office Building
Washington, D.C. 20515
(202) 225-3161

RE: Child Tax Credit updates

From: "Orr, Caleb (Rubio)" <caleb_orr@rubio.senate.gov>
To: "Kowalski, Daniel" <daniel.kowalski@treasury.gov>
Date: Fri, 14 Jul 2017 13:14:16 -0400

Thanks very much, Dan. Yes it has been awhile, and I hope you are well at Treasury with its fast pace. Seems like exciting times are ahead!

From: Daniel.Kowalski@treasury.gov [mailto:Daniel.Kowalski@treasury.gov]
Sent: Thursday, July 13, 2017 6:37 PM
To: Orr, Caleb (Rubio)
Subject: RE: Child Tax Credit updates

Thank you. It's been a while since I heard from you. I trust you are well. I've seen a couple of these articles and will look at the others. As you might suspect, no decisions have been made yet on what we do on this issue. Dan

From: Orr, Caleb (Rubio) [mailto:Caleb_Orr@rubio.senate.gov]
Sent: Thursday, July 13, 2017 4:27 PM
To: Kowalski, Daniel <Daniel.Kowalski@treasury.gov>
Subject: Child Tax Credit updates

Dan,

I wanted to make sure you had seen some recent articles about the Child Tax Credit and how it can best fulfill President Trump's promises on child care.

[Ramesh Ponnuru: How Trump Can Make Good on His Child-Care Promises](#)
[Forbes: Top Marginal Tax Rates, Child Tax Credits, And Tax Reform In The Trump Era](#)
[National Review: A Better Way Forward on Family Policy](#)
[Niskanen Center: Cash is Superior to Child Care](#)
[Elaine Maag: Why Trump Might Want To Shift Towards The Child Tax Credit For Low-Income Families](#)

And an interesting end-note from Ross Douthat's [column](#) on the Senate healthcare bill a few weeks ago:

In an environment where de-industrialization and social breakdown have driven the working class Trumpward, saying *we should not oversubsidize their health insurance* should be followed by saying *so that we can find other ways to help them*.

Which the Republican Party could do, if it so chose. It could pass this bill, flaws and all, and then use the projected cost savings for a tax reform that doesn't just use, say, a small child tax credit as a fig leaf for huge upper-bracket tax cut, but that's actually organized around payroll tax cuts, refundable child tax credits, a larger earned-income tax credit, and other measures that would make up for the thinning of working-class insurance coverage with more cash in paychecks and bank accounts.

Best regards,

Caleb Orr
Legislative Assistant
Senator Marco Rubio
202-224-3041

Sec. Mnuchin Mtg Request - Municipal Finance Caucus

From: "Hulse, Bill" <bill.hulse@mail.house.gov>
To: "Bailey, Bradley" <bradley.bailey@treasury.gov>
Cc: "Heitlinger, David" <david.heitlinger@mail.house.gov>
Date: Mon, 17 Jul 2017 11:44:36 -0400
Attachments: Muni Caucus - Mnuchin Mtg Request - 7.17.17.pdf (1.07 MB)

Brad –

Attached is a meeting request from Congressman Hultgren and Congressman Ruppersberger, the Co-Chairs of the Municipal Finance Caucus, to discuss tax reform. Specifically, Members of the Municipal Finance Caucus would appreciate the opportunity to discuss the tax-exempt status of municipal bonds in advance of the Administration releasing a more detailed policy proposal regarding comprehensive tax reform. You and I touched base on the issue earlier this year.

Please let David and I know how we can help facilitate this meeting.

Thank you,
Bill

Bill Hulse | [Legislative Assistant](#)
U.S. Representative Randy Hultgren (IL-14)
2455 Rayburn | Washington, DC 20515
Office: (202) 225-2976
[Website](#) | [Facebook](#) | [Twitter](#)

RE: first joint meeting

From: "Prater, Mark (Finance)" <mark_prater@finance.senate.gov>
To: "Angus, Barbara" <barbara.angus@mail.house.gov>, "West, Thomas" <thomas.west@treasury.gov>
Date: Tue, 08 Aug 2017 20:17:27 -0400

Thanks.

Sent from my Verizon, Samsung Galaxy smartphone

----- Original message -----

From: "Angus, Barbara" <Barbara.Angus@mail.house.gov>
Date: 8/8/17 5:12 PM (GMT-08:00)
To: "Prater, Mark (Finance)" <Mark_Prater@finance.senate.gov>, Thomas.West@treasury.gov
Subject: RE: first joint meeting

Thanks, Mark. Exactly my thinking on sending out the draft in advance. Will do that as soon as the time is set. And will send a note about timing as soon as I hear back from the drafters. No need to get Alex involved on times – I'll be back on that tomorrow morning.

Barbara M. Angus
Chief Tax Counsel
Committee on Ways and Means
202.225.5522

From: Prater, Mark (Finance) [mailto:Mark_Prater@finance.senate.gov]
Sent: August 8, 2017 7:55 PM
To: Thomas.West@treasury.gov; Angus, Barbara <Barbara.Angus@mail.house.gov>
Subject: RE: first joint meeting

Thanks. Good to get the ball rolling. I can have Alex coordinate times if that would be helpful.

Think it makes sense to do the specs discussion first. Could also circulate the draft in advance of the first drafting session, so folks have some time to review, get comments together, and then chat through.

Sent from my Verizon, Samsung Galaxy smartphone

----- Original message -----

From: Thomas.West@treasury.gov
Date: 8/8/17 4:25 PM (GMT-08:00)
To: Barbara.Angus@mail.house.gov, "Prater, Mark (Finance)" <Mark_Prater@finance.senate.gov>
Subject: Re: first joint meeting

Sounds good.

I had to drop off the call but I think you flagged pass-throughs as topic one, correct?

From: Angus, Barbara <Barbara.Angus@mail.house.gov>
Date: August 8, 2017 at 7:21:28 PM EDT
To: West, Thomas <Thomas.West@treasury.gov>, Prater, Mark (Finance) <Mark_Prater@finance.senate.gov> <Mark_Prater@finance.senate.gov>
Subject: first joint meeting

Am very happy the technical meetings of the teams are starting – I think it will be very valuable. I've reached out to the drafters to ask about their availability for a meeting either Thursday or Friday morning on our first topic – I think that meeting will be more of a discussion than a drafting session but I'd like to give Henry a chance to be there if he can as he has done a lot of work on this issue. Will send a scheduling message tomorrow morning as soon as I hear back. Thanks very much!

Barbara M. Angus
Chief Tax Counsel
Committee on Ways and Means
1136 Longworth House Office Building
202.225.5522
barbara.angus@mail.house.gov

Re: follow up

From: "Maloney, Drew" </o=ustreasury/ou=exchange administrative group (fydibohf23spdlt)/cn=recipients/cn=0aa00d7c98de43f9aec8f68a919f6fe3-maloney, drew">
To: "Herndon, Randy (Toomey)" <randy_herndon@toomey.senate.gov>
Date: Wed, 27 Sep 2017 20:50:57 -0400

Thank you, it was a pivotal meeting. Let's touch base on budget.

Drew Maloney
Assistant Secretary of the Treasury
Legislative Affairs
United States Department of the Treasury
1500 Pennsylvania Avenue, NW Suite 3134
Washington, DC 20220
Office: 202-622-1900
Cell: (b) (6)
drew.maloney@treasury.gov

From: Herndon, Randy (Toomey) <Randy_Herndon@toomey.senate.gov>
Date: September 27, 2017 at 3:12:13 PM EDT
To: Maloney, Drew <Drew.Maloney@treasury.gov>
Subject: follow up

Sorry that our convo got cut off.

I failed to let you know how appreciative my boss is of your team and your boss's efforts in helping get to consensus w/ Senate GOP Budget members on the \$1.5T number.

Huge first step. Thanks again.

Randy Herndon | Tax Counsel
Office of U.S. Senator Pat Toomey
202-224-4254 | toomey.senate.gov



Rough Outline of Thoughts for Estimate

From: b(6)@treasury.gov>
To: "Dowd, Tim" <tim.dowd@mail.house.gov>, b(6)@jct.gov>
Cc: b(6)@treasury.gov>, b(6)
b(6)@treasury.gov>
Date: Mon, 23 Oct 2017 17:28:01 -0400
Attachments: Portman Toomey Inbound_np v2.docx (22.25 kB)

Hi Tim b(6)

For what it is worth, here is an initial (rough) outline of our understanding of the general specifications of, and a possible (rough) methodology for estimating, the Oosterhuis “inbound” proposal. These are preliminary thoughts subject to (major) change, but documents some of the aspects of the proposal that will need to be modelled..

b(6)